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Cambodia

HRI Food Service Sector

Outlook

2006

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Report Highlights:

The high growth in Cambodia's tourism industry and the sharply increasing number of hotels and restaurants in Siem Reap are creating a prime, promising market for many imported food and beverage products within the HRI sector. This report will provide a brief overview of the Cambodian food service market for U.S. exporters who are interested in exporting their products to Cambodia.

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Market Summary

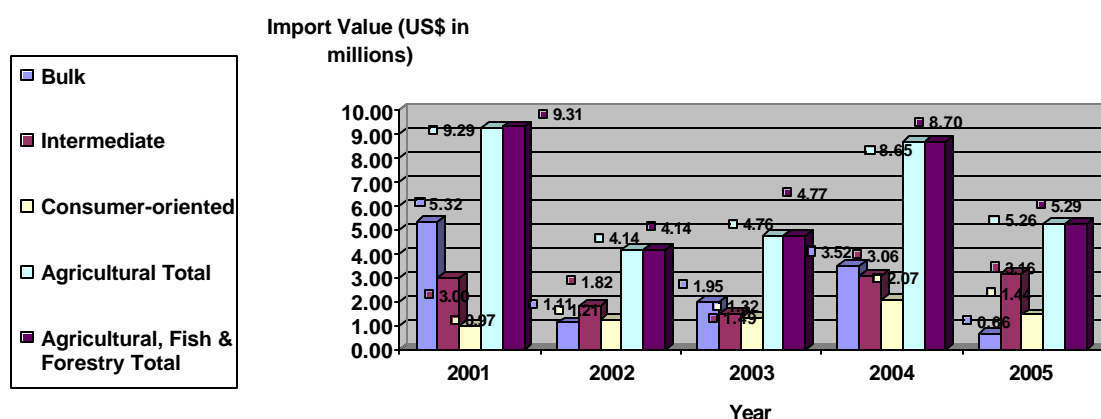
Cambodia, a Southeast Asian country in the southern part of Indochina, covers an area of 181,053 square kilometers and has a population of about 13.87 million in 2005. Cambodia is bordered by Thailand to the west and northwest, Laos to the northeast, Vietnam to the east and southeast, and the Gulf of Thailand to southwest. Cambodia's population consists of three main ethnic groups: Khmer (90 percent), Vietnamese (5 percent), Chinese (1 percent) and others (4 percent). Despite recent progress, the Cambodian economy continues to suffer from the effects of decades of civil war and internal strife. The Cambodian economy is still essentially aid-dependent. Investment in infrastructure and social services is predominantly funded by overseas development aid and concessionary loans. Per capita income is rapidly increasing but is low compared with other countries in the region. Per Capita GDP was US\$357/year in 2004. There is an agreement between the union of workers and the garment manufacturers on the minimum wage of US\$40 per month in the textile industry, the leading industry in the country. Although wage rates have increased over the past year, they still average out to only US\$25-30 per month. Foreign textile companies are currently paying approximately US\$100 to US\$150 per month for qualified workers with minimal English language skills; US\$200 to US\$350 per month for workers with good English language skills and perhaps a higher education; and up to US\$700 per month for bilingual, well educated, well connected workers. With an overall illiteracy rate of only 30%, Cambodia's workforce is extremely undereducated, with the result that most residents rely on agriculture for subsistence.

Food, Beverage and Tobacco Expenditure per household in Cambodia 1998-2002

Expenditure Value (in million US\$)	1998	1999	2000	2001	2002
Food, Beverage and Tobacco Expenditure	1,798	1,965	1,967	1,935	1,995
% of total household consumption expenditure	62.96%	64.70%	64.13%	63.09%	62.61%

Sources: National Institute of Statistics and USDA Thailand

Cambodia agricultural imports from USA (2001-2005)



Source: The United State Department of Agriculture

Agriculture remains the mainstay of the economy, accounting for about 43 percent of GDP. Most rural households depend on agriculture and its related sub-sectors. Rice, fish, timber, garments and rubber are Cambodia's major exports, and the United States, Singapore, Japan, Thailand, Hong Kong, Indonesia and Malaysia are its major export partners. Cambodian imports originate primarily in other Southeast Asian countries such as Thailand and Vietnam; principal imports are cigarettes, gold, construction materials, petroleum products, and machinery.

Cambodia: Major Trading Partners, 2004

Exports	Million US\$	Share (%)	Imports	Million US\$	Share (%)
USA	1,412.55	56.20	Thailand	795.63	23.94
Germany	288.76	11.49	Hong Kong	497.22	14.96
UK	175.86	7.00	China	447.45	13.47
Canada	107.66	4.28	Singapore	383.33	11.54
Vietnam	94.22	3.75	Vietnam	252.88	7.61
Japan	90.49	3.60	South Korea	123.42	3.71
Singapore	43.92	1.75	Indonesia	110.04	3.31
France	40.14	1.60	Malaysia	91.91	2.77
Netherlands	36.38	1.45	Japan	88.39	2.66
Spain	31.10	1.24	USA	62.59	1.88

Cambodia is ethnically homogeneous, as more than 90 percent of its population is of Khmer origin and speaks the Khmer language, the country's official language. French is spoken by many Cambodians as a second-language and is often the language of instruction in various schools and universities. Cambodian French is a dialect found in Cambodia. It is also frequently used in government. However, in recent decades, many younger Cambodians, as well as members of the business-classes, have favored learning English and it is gradually becoming more widely known. The share of the labor force in the primary economic sector, agriculture, has decreased from 75 percent in 1999 to 55 percent in 2004, reflecting an increase in employment in higher productivity modern manufacturing, notably the garment industry, and in urban services. A majority of households still take part in crop production, 83 percent in the wet season and 34 percent in the dry season.

Projected population by provinces, 2003-2007, Cambodia

Province	2003	2004	2005	2006	2007
Batambang	962,672	979,823	997,840	1,016,734	1,036,523
Kampong Cham	1,804,956	1,830,722	1,857,500	1,885,335	1,914,152
Kampong Chhnang	490,220	501,455	513,179	525,411	538,163
Kampong Thom	656,474	668,895	681,692	694,857	708,398
Kandal	1,207,096	1,224,433	1,242,506	1,261,297	1,280,781
Phnom Penh	1,231,630	1,272,386	1,313,851	1,355,934	1,398,555
Prey Veng	1,027,518	1,035,672	1,044,376	1,053,642	1,063,494
Siemreap	821,964	841,268	861,214	881,803	903,030
Sihanoukville	195,130	201,981	209,005	216,219	223,608
The rest of country	4,889,393	4,985,775	5,085,760	5,189,421	5,296,815
Total	13,287,053	13,542,410	13,806,923	14,080,653	14,363,519

Sources: National Institute of Statistics

The existing sources of economic growth remain narrowly based on garment and tourism. Garments, timber, tobacco, agro-industry and tourism are the fastest growing business sector in Cambodia. There are two hundred factories producing for the American and European markets. British American Tobacco has been developing a cigarette brand for the Cambodians and is growing tobacco leaves for export. Tiger Beer has established its most modern brewery in Asia outside Phnom Penh city. Nestlé is in a joint venture with a Cambodian partner to produce milk and dairy products for the domestic market and for export within Asia. World-class names are managing hotels and resorts in Phnom Penh and Siem Reap. These investments are within the range of two to fifty million US dollars. There is an agreement between the union of workers and the garment manufacturers on minimum wage of US\$40 per month in the industry. The economy has entered a new phase with the ending of the Multi-Fiber Agreement (MFA) in early 2005. The expected slowdown in garment exports will be partly counterbalanced by expected strong growth in tourism. GDP growth in 2006 is forecast to increase up to 4.1 percent and 4.7 percent in 2007, reflecting strong domestic economy, with construction activity leading the expansion.

The Cambodian government continues to work with bilateral and multilateral donors, including the World Bank and IMF, to address the country's many pressing needs. In December 2004, official donors pledged \$504 million in aid for 2005 on the condition that the Cambodian government implement steps to reduce corruption. The major economic challenge for Cambodia over the next decade will be fashioning an economic environment in which the private sector can create enough jobs to handle Cambodia's demographic imbalance. More than 50% of the population is 20 years or younger. The population lacks education and productive skills, particularly in the poverty-ridden countryside, which suffers from an almost total lack of basic infrastructure. Fully 75% of the population remains engaged in subsistence farming.

Major Economic Indicators, Cambodia, 2004-2007, percent

Item	2004	2005	2006	2007
GDP growth	6.0	2.3	4.1	4.7
GDI/GDP	20.7	18.5	19.0	19.5
Inflation (CPI)	3.9	3.5	3.0	3.0
Money supply (M2) growth	30.1	17.0	22.0	25.0
Fiscal balance ^a /GDP	-6.4	-6.3	-6.0	-5.4
Merchandise export growth ^b	21.7	-9.1	1.7	5.2
Merchandise import growth	22.2	-4.8	4.7	7.6
Current account/GDP	-9.8	-11.7	-11.3	-10.5
Exchange Rate, Average (Riels/US\$)	4,016	4,093	4,172	4,196
Population in Millions	13.64	13.87	14.10	14.34

^a Excluding grants / ^b Domestic exports

Sources: National Institute of Statistics; National Bank of Cambodia; International Monetary Fund; and Global Insight

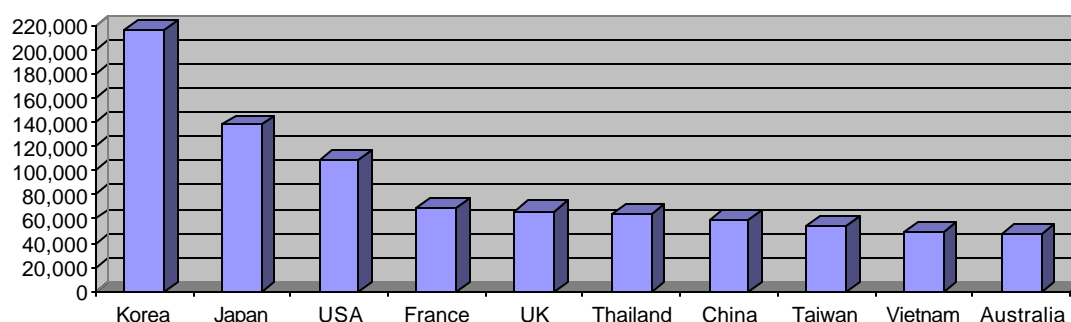
The tourism sector is also booming as improving security and political stability is attracting a large number of tourists. The tourism industry is the country's second-greatest source of hard currency after the textile industry. More than 60 percent of visitor arrivals are to Angkor Wat and Angkor Thom in Siem Reap, and most of the remainder to Phnom Penh. Other tourist hotspots include Sihanoukville, Cambodia's only port and developed coastal beach area. Cambodia's tourist market increased by 35 percent in 2005, in line with the country's aim to triple tourism in the next five years. Over 1.4 million tourists visited Cambodia according to the Ministry of Tourism, from slightly over 1 million in 2004. The number of tourist arrivals is targeted to reach about three million arrivals a year by 2010. Tourism comes mainly from Korea, Japan, USA, France, UK, Thailand, China, etc. Increased stability and security is credited for the jump, as well as government efforts to encourage eco-tourism and visits to Cambodia's historical sites, such as the World Heritage-listed Angkor temples. Cambodia is aggressively promoting tourism and both in Phnom Penh and in Siem Reap new hotels are going up. Cambodian, Thai, and to a lesser extent Western investments in travel infrastructure are particularly large near Angkor Wat and the Khmer temple complexes. In general, although service is still not up to most tourism-oriented countries' standards of friendliness and efficiency, the hotel and tourism sector is definitely growing and improving daily. Hotels, restaurants, and other food outlets are going up by the day in Siem Reap as the tourism industry around Angkor Wat races to meet growing demand.

Total Visitor Arrivals to Cambodia from January-December 2004-2005

	2004		2005		%Change 2004/2005
	No. of Tourists	% Share	No. of Tourists	% Share	
Phnom Penh & Other Destination	494,255	46.84%	744,806	52.39%	50.69%
Siem Reap	560,947	53.16%	676,809	47.61%	20.65%
Total	1,055,202	100.00%	1,421,615	100.00%	34.72%

Source: Statistics & Tourism Information Department, Ministry of Tourism

Top 10 Main Market Arrivals to Cambodia from Jan-Dec 2005



Country	Korea	Japan	USA	France	UK	Thailand	China	Taiwan	Vietnam	Australia
2005	216,584	137,849	109,419	68,947	66,535	63,631	59,153	54,771	49,642	47,465
Share (%)	15.24%	9.70%	7.70%	4.85%	4.68%	4.48%	4.16%	3.85%	3.49%	3.34%

Source: Statistics & Tourism Information Department, Ministry of Tourism

The high growth in Cambodia's tourism industry and the sharply increasing number of hotels and restaurants in Siem Reap are creating a prime, promising market for many imported food and beverage products for HRI sector. It is estimated that about 75 percent of each tourist dollar is currently returned to Thailand and Vietnam to import fresh vegetables, fruit, meat, processed foods, flowers and other products required by hotels and restaurants serving these tourists. Over 50 percent of tourists go directly to visit Angkor Wat in Siem Reap, so most of import food and beverage sales are generated from this city. It is estimated that there are already nearly 10,000 hotel and guesthouse rooms in Siem Reap, with another 2,000 planned by the end of 2006. At full capacity, the city can accommodate around 15,000 people at one time, or 150,000 over a month assuming the average length of stay is three days.

It is estimated that nearly 200 restaurants currently operate and cater to foreign tourists. About 80 percent of food and beverage used in these hotels and restaurants are imported products mainly from Thailand, Vietnam and Singapore. Almost 35 percent of hotel revenue is mainly generated from food and beverage sale and an average meal cost per customer per visit is US\$30. The distribution of these imported food and beverage products supplied to hotels and restaurants are supplied from Phnom Penh, where major importers/retailers are located. These importers are bringing the products into Phnom Penh mainly from three sources: Thailand via road from Aranyaprathet (Poipet), Vietnam via road/air to Phnom Penh, Singapore and Malaysia via sea freight through Sihanoukville deep seaport. The hotels in Siem Reap in particular also provide the outside catering service for the official function for public and private sector, which mostly will be organized near Angkor Wat. The price per head for this outside catering service ranges from US\$20-US\$2,000 based on the venue and variety of menu selections.

Cambodia food is closely related to the Thai and Laos cuisine. In general, Khmer cuisine is similar to Thai but with fewer spices. Curries, stir fried vegetables, rice, noodles and soups are staples of the Khmer diet. Especially important is rice, the major staple in Cambodia. The Battambang region is the country's main rice growing area. The French influence is best seen in the daily-baked baguettes of bread. Sweet dishes include sticky rice cakes and jackfruit pudding. All the famous international brands of soft drinks are widely available in Cambodia. Locally produced and import mineral water are available at 500 Riels to \$2.20. The main local beer is Angkor, which is produced by an Australian joint venture in

Sihanoukville. Other brands include Heineken, Tiger, Carlsberg, San Miguel, Foster's, Singha and Chang, which selling price ranging from US\$1 to US\$1.50 per can. In Phnom Penh and Siem Reap, imported wines and spirits are available for the tourist at 3-5 star hotels and restaurants. The tropical fruits grown in Cambodia are banana, coconut, durian, jackfruit, longan, lychee, mangosteen, papaya, pineapple, rambutan, sugar palm, and watermelon. The estimated food, beverages and tobacco expenditure per capita was about US\$151 annually in 2002.

Most cheese products available in Cambodian market are available from Australia, New Zealand, France and Netherlands, while butter and other dairy products are usually sourced from Australia and New Zealand. Hydroponic vegetables from both Thailand and Vietnam are popular and of high quality. Angkor beer and Thai beer are major players in this market. Even though there is a growing demand of seafood products such as imported salmon and scallops, most seafood products available in this market are river fish, which are locally available. Besides local beef, Australian beef is widely available in most hotels and restaurants due to its cheaper product cost compared to U.S. beef. Poultry products are supplied domestically and some are brought over from Thailand. Turkey will be available mostly during the Thanksgiving holiday festival. Price is usually the key factor influencing purchases of meats and seafood. Unquestionably, French wine dominates the wine market in Cambodia while Australia wines are being aggressively introduced to this market due to their price comparative advantage.

Advantages and Challenges for U.S. Exporters

Advantages	Challenges
- The growing retail food industry needs imported food and beverage products.	- Consumers are very price-conscious and local Cambodian people are not ready for import products.
- Cambodian importers are seeking U.S. suppliers who can offer reliable and quality products, consolidators of mix containers at the competitive price.	- U.S. exporters don't know much about the Cambodia market and at the same time higher prices for U.S. food products relative to local market products and other exporting countries such as Thailand, Vietnam, Singapore, Australia, New Zealand.
- GDP growth in 2006 is forecasted to increase up to 4.1 percent and 4.7 percent in 2007.	- U.S. products are not always price-competitive compared to imports from other Asian countries due to high tariffs, shipping costs and time to Cambodia.
- The accelerated growth in tourism industry is ratcheting up demand for HRI products, especially U.S. beef, turkey, seafood, wine and seasonings which can be used in up-scale hotels and restaurants in both Phnom Penh and Siem Reap. The 35 percent increased in number of tourists visiting Cambodia reached 1.4 million in 2005.	- High tariff on imported food and beverage products to Cambodia and high level of smuggling across borders.
- Nearly 300 hotel and 200 restaurants cater to tourists and expatriates in Cambodia. These F&B outlets serve high price local and western menus using imported food items such as beef, lamb,	- Limited no. of importers in Phnom Penh and Siem Reap; Many importers and distributors are less familiar with U.S. food and beverage products.

frozen French fries and wines.	
- U.S. food and beverage products have a good quality image among consumers.	- Underdeveloped and unreliable cold chain system and electricity instability in Cambodia impede the growth of premium frozen products to enter into the HRI sector.
- High opportunities for U.S. exporters to supply food and beverage products to the Cambodia growing hospitality sector.	- Competition is stiff from other countries and locally produced products.

Road Map for Market Entry

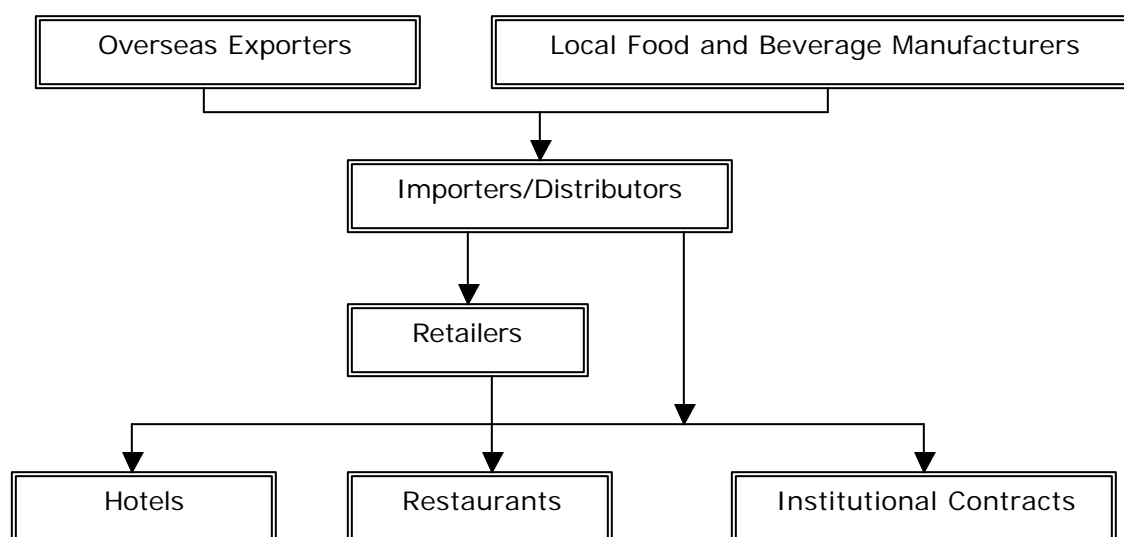
Supermarkets and convenience stores play significant roles in distributing imported food products to HRI sector both in Phnom Penh and Siem Reap. The major well-known players in this sector are Bayon Market group, Lucky Market Group and Thai Huot Trading. In Phnom Penh and Siem Reap, these supermarkets and convenient stores have developed to provide a wide range of mainly imported products to high-income Cambodian people, expatriates and tourists. Retailers in Phnom Penh arrange their own imports while smaller supermarkets in Siem Reap position themselves as distributors and source their products from the importers based in Phnom Penh. Even though many U.S. products are carried such as Norbest Turkey, Lamb Weston frozen french fries, Washington apples, Hormel luncheon meats, Ocean Spray fruit juice, Campbell canned soup, Hersheys, Kellogg cereals, Betty Crocker cookies and cereals, Jim Beam bourbon and some California wines; most imports are made from Thailand, Vietnam and Singapore. Limited import quantities and high import costs are the major hurdles limiting these importers from importing directly from the original exporting sources. Export opportunities in Cambodia HRI market may not be readily apparent, as many hotels and restaurants still prefer to source local products due to the availability of local products such as the abundant local fish for domestic Khmer cuisine and the competitive price of local food and beverage products. The booming tourism industry has pushed up the number of hotels and restaurants around Angkor Wat area. To differentiate their outlets from the others, hotels and restaurants have to find other innovative food products to serve their clients. A growing demand for new and high quality products offers great opportunities for U.S. products to enter this market.

The best market entry strategy for U.S. exporters is to appoint local importers specialized in the food service industry to import and market the exporter's food products to HRI establishments. These importers have already established reliable and efficient distribution channels and have the expertise in food import procedures and know how to deal with the government officials. The distribution system is very complicated due to the wide range of domestic and imported products traded, the many market channels, and the fact that so many products are still traded illegally. Traditional wet and dry markets still play a dominant role in the domestic distribution system. It is estimated that about 90 percent of the food products traded in Cambodia are moving through this system.

Retailers in Phnom Penh represent the best potential for U.S. exporters as most of them also act as the importers for food and beverage products distributed to the HRI industry. Direct import from the U.S. is still very limited, as most importers prefer to source products from Thailand, Vietnam and Singapore due to limitation in import volumes. According to trade sources, most importers are willing and interested in direct imports from the U.S., and would like to work with U.S. consolidators in particular. This direct import by Cambodian importers is expected to take place if the market can maintain its growth rate to support the import volume necessary to achieve break-even levels. Substantial product knowledge and other types of training are especially helpful for this market. The appropriate timeframe to conduct

any kind of training to the retail and HRI trade contacts is during April-June, which is the low season period.

Distribution Channel for HRI Food Service in Cambodia



Regulations on Importing Food and Beverage Products

Import duties are levied on any imported products before release from Customs, except for products receiving specific privileges that qualify according to the laws and regulations, where duties and taxes are exempted. There are three types of duties and taxes that the importer has to pay before imported products are released from Customs:

- Customs import duties with an ad valorem rate;
- Excise tax for specific categories of products such as wines and other alcohol beverages;
- Value added tax (VAT) - all imported food and beverage products are subject to 10 percent of VAT

The import duty rates for food and beverage products range from 0-35 percent as follow:

- Duty rate of 0 percent for products that government policy provides not to collect duties
- Duty rate of 7 percent for primary products and raw materials
- Duty rate of 35 percent for processed food and beverage products; luxury products; and government protected products

According to trade sources, imported high value food and beverage products for HRI industry such as chilled/frozen meat, frozen french fries, wines, cheese, and frozen seafood, etc. are subjected to a 35 percent import tariff rate while fresh fruits and vegetables are subject to 7 percent import duty. Excise tax of 15 percent will be applied to imported wines and other alcohol beverages on top on the import duty. However, import of pork into Cambodia is not permitted according to government policy (to protect local production).

The government requires all packaged food products to provide expiration dates and bar codes printed on the packages. If the packages don't specify the apparent expiration dates, it is compulsory for the importers to get pre-shipment clearance from local Custom officials, which is very complicated and time-consuming. The nontransparent practice of some government officials is still found in Cambodia as some importers have to pay almost US\$500 for each container of imported products instead of paying only US\$200 as required

by the government for the official import fee. Cambodia's Customs Department requires importers and exporters to provide a bill of lading/airway bill, packing list, and invoice for all shipments. Products imported from Vietnam via the Mekong River must also have a transit license.

Best Product Prospects

There are good opportunities for U.S. products to capture a greater share of this fast growing market. For example, U.S. beef is highly regarded, but it is not widely marketed due to strong competition from Australian beef and lamb. U.S. frozen french fries are also in demand, but not widely distributed. These products deserve higher levels of marketing and promotion in order to compete with similar products from Australia and other origins. Similar opportunities exist for U.S. wines.

- A. In the market with potential: beef, turkey, frozen french fries, apples, grapes, nuts and dried fruits, sauces and condiments (mustard, ketchups and hot sauces), chocolate, cheese, break fast cereals, pasta, olive oils, fruit juices, bread flour, wines and spirits, coffee, tea, and mineral waters.
- B. Not present in significant quantities, but strong potential: seafood products (Alaska King Crab, scallop, lobsters, mussels), frozen berries, canned fruits, bakery ingredients, cocoa powder, other fresh fruits and vegetables, salad dressings, canned soups, frozen peas, jams (nut based and chocolate spreads), pickles, vinegars.

U.S. Consumer-Oriented Agricultural Exports to Cambodia 2001-2005

Product	2001	2002	2003	2004	2005
Snack Foods (Excl nuts)	55,000	136,000	183,000	122,000	150,000
Breakfast Cereals & Pancake Mix	5,000	28,000	4,000	15,000	18,000
Red Meats, Fresh/Chilled/Frozen	19,000	29,000	30,000	835,000	27,000
Poultry Meat	35,000	46,000	28,000	0	30,000
Dairy Products	186,000	20,000	22,000	186,000	273,000
Fresh Fruits	498,000	692,000	583,000	593,000	528,000
Fresh Vegetables	0	0	3,000	0	0
Processed Fruits & Vegetables	45,000	64,000	252,000	71,000	148,000
Fruit & Vegetable Juices	3,000	9,000	5,000	0	0
Tree Nuts	0	0	0	0	6,000
Wine & Beer	113,000	159,000	159,000	192,000	239,000
Other Consumer-Oriented Products	6,000	22,000	53,000	58,000	23,000
Total	965,000	1,205,000	1,321,000	2,073,000	1,442,000

Source: The United States Department of Agriculture

Hotels Contact Information**FCC Angkor hotel**

Pokambor Ave,
Siem Reap, Cambodia
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Fax: (855) 63 760 281
Email: ben@fcccambodia.com
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Contact: Mr. Benoit Jancloes, General Manager

Hotel De La Paix

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Tel: (855) 63 966 000
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Website: www.hoteldelapaixangkor.com
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Le Meridien Angkor

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Contact: Mr. Lima Seng, Assistant Food and Beverage Manager

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Fax: (855) 63 964 608
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Website: www.accorhotels.com/asia
Contact: Mr. Serge Rigodin, Chef and Beverage Director

Victoria Hotels and Resorts Angkor

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Website: www.victoriahotels-asia.com
Contact: Mr. Boun Kean Eap, Food and Beverage Director

Post Contact And Further Information

The Foreign Agricultural Service in Bangkok maintains up-to-date information covering food and agricultural import opportunities in Thailand and would be pleased to assist in facilitating U.S. exports and entry to the Thai market. Questions or comments regarding this report should be directed to the Foreign Agricultural Service in Bangkok at the following local or U.S. mailing address:

<u>Local:</u>	<u>U.S. Mail:</u>
Office of Agricultural Affairs U.S. Embassy 120-122, Wireless Road Bangkok 10330 Tel. +662-205-5106 Fax. +662-255-2907 Email: agbangkok@usda.gov Home page: www.usdathailand.org	Office of Agricultural Affairs U.S. Embassy, Box 41 APO AP 96546

End of Report.